

Notes

Be sure to check the date in the upper right hand corner to make sure you are using the latest version of this job aid.

The CSV report format creates an Excel compatible output.


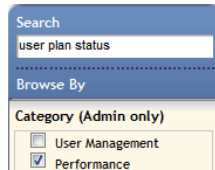
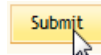
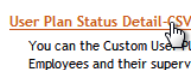

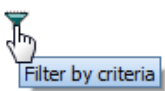

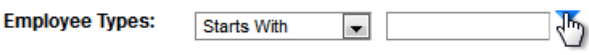
It is critical to follow these steps to select your users. Do **not** try to select all of your users by name, as this will certainly "time out" your process and disable your ability to run the report.

If you do not see the Employee Types field, you will need to click the **Add/Remove Criteria** icon to add the field to your search screen.

Notifying Supervisors to Approve IDPs

As the IDP plan period draws to a close, it is important to make sure that all supervisors have approved the plans of their subordinates. As an administrator, you have the ability to run a report that will identify all the users that still have IDPs in Pending Approval status. The report also provides the email address of the user and most importantly, the email address of the user's supervisor.

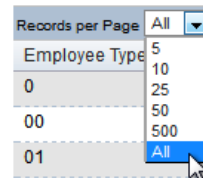
The following procedure will identify how to run the report, filter resulting data to view only those IDPs in Submit Pending status, and then create an email message to all supervisors with pending plans, requesting them to login to AgLearn and approve or reject all pending plans.

Step	Activity	View
1.	From the AgLearn Admin Home Page, select Reports .	
2.	In the Search box, enter User Plan Status ; then select only the Performance category.	
3.	Click Submit .	
4.	Select the User Plan Status Detail-(CSV) report.	
5.	To include AgLearn IDs in your report, clear the Mask User IDs box.	
6.	Click the User Filter by criteria icon.	
7.	In the Domains field, enter your Agency acronym	
8.	Click the Employee Types Filter by criteria icon.	

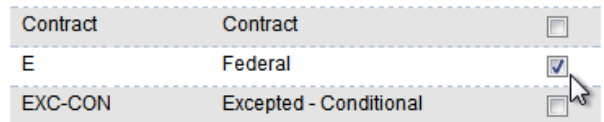
Notes

Notifying Supervisors to Approve IDPs

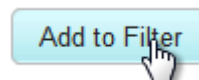
9. Change the Records per Page to **All**.



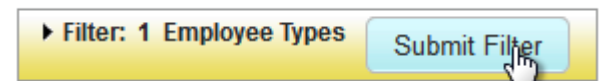
10. Scroll down about 26 entries and select the **Federal** employee type



11. Click **Add to Filter**.



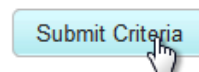
12. Click **Submit Filter**.



13. Note that the Employee Types field now indicates **[1 Selected]**.



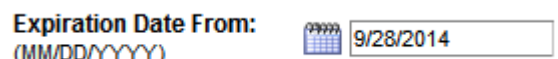
14. Click **Submit Criteria**.



15. Observe that the User field now indicates criteria have been specified.



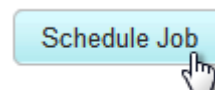
16. In the **Expiration Date From** field, enter a date just prior to the end of the fiscal year.



17. In the **Expiration Date To** field, enter a date just after the end of the fiscal year.



18. Click **Schedule Job**.



Note: Do *not* click Run Report. Your report will strain system resources. A report capturing all agency data is too large to run during normal operating hours.

19. Click the **Schedule this job to recur as follows** option button.



To capture all plans that expire around the end of the fiscal year, we'll enter dates just before and just after September 30th.

Notes

Notifying Supervisors to Approve IDPs

20. Select the **Weekly** option; then select the day you wish to run the report.

☐ Daily
☒ Weekly
☐ Monthly
 Time of Day: (hh:mm AM/PM)
 Day:
 Date: Sunday
 12:00 AM Monday
 Tuesday

You must select a time between 12:00 AM and 5:00 AM.

21. Enter the time that you wish to run the report.

Time of Day: (hh:mm AM/PM)

Descriptions help to distinguish the report from others you've created. This is helpful, especially if you are receiving multiple system emails regarding recurring reports.

22. Enter a **Job Description**.

Job Description:

23. Check the **Notify via email upon completion** as well as the **Email the Report** checkbox. Be sure your correct email address is identified.

☒ Notify via email upon completion
 Email:
 Email the Report ☒

24. Click **Finish**.



You will receive a weekly email from AgLearn.System@ocio.usda.gov. Attached to the email will be the CSV report with the most recent data.

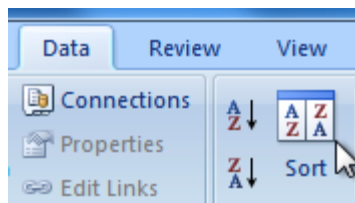
25. Observe the message; then click the **Finished** button to complete the scheduling process.

Recurring Report Job Scheduled
 Status:
 Recurring Report Job Scheduled: 3586
 Finished

26. When the report is delivered to your email, launch Excel and open the file.



27. From the **Data** tab, select **Sort**.



28. Select **Status** as the sort criteria; then click **OK**.

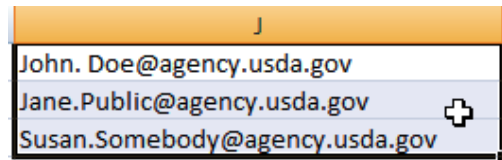
Sort
 Add Level Delete Level Copy Level Options... My data has headers
 Column Sort On Order
 Sort by Status Values A to Z
 OK Cancel

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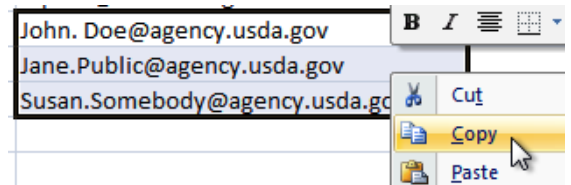
Now that you've sorted the data by Status, the next steps will show you how to create an email distribution list of all supervisors who have subordinates with IDPs in Submit/Pending status.

Notifying Supervisors to Approve IDPs

29. Locate the section of the spreadsheet that contains plans in Submitted For Approval status. In column J of the spreadsheet, select all the cells (Supervisor email addresses) associated with this status.



30. Right-click the selection and choose **Copy**.



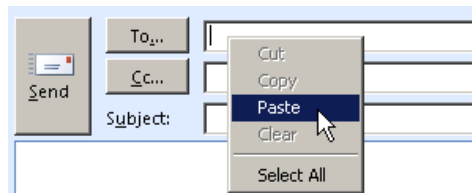
31. Launch Outlook.



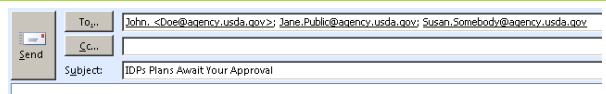
32. Begin a new email message.



33. In the **To:** address area, right-click and choose **Paste**.



34. You can now enter a subject and text encouraging supervisors to complete their IDP approvals. Suggested text appears at the end of this job aid.



35. Click **Send**.



Recommended text for email message to supervisors:

*Our records indicate that you have at least one subordinate with an IDP plan waiting for your approval in AgLearn. To review and approve (or reject) this plan, please login to AgLearn. In the Easy Links area of your Home Page, select the **Approvals** link. On the Pending Reviews and Approvals page, select the **Performance Management** tab. Subordinate Plan Approvals will be listed at the bottom of the screen. For each subordinate, select the **Review** button, then select **Approve** or **Deny** to take action on the plan.*

Please note that all actions on subordinate FY13 IDP plans must be completed no later than September 30th, 2014.

If you have any questions about this notice, please contact me at the email address or phone number listed below.

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